Faculty & Advisor Banner Self-Service Guide

V2.0

This documentation is proprietary information of SunGard Higher Education and is not to be copied, reproduced, lent or disposed of, nor used for any purpose other than that for which it is specifically provided without the written permission of SunGard Higher Education.

SunGard Higher Education

4 Country View Road
Malvern, Pennsylvania 19355
United States of America
(800) 522 - 4827

Customer Support Center website
http://connect.sungardhe.com

Distribution Services e-mail address

distserv@sungardhe.com

Other services

In preparing and providing this publication, SunGard Higher Education is not rendering legal, accounting, or other similar professional services. SunGard Higher Education makes no claims that an institution's use of this publication or the software for which it is provided will insure compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting and other similar professional services from competent providers of the organization's own choosing.

Trademark

Without limitation, SunGard, the SunGard logo, Banner, Campus Pipeline, Luminis, PowerCAMPUS, Matrix, and Plus are trademarks or registered trademarks of SunGard Data Systems Inc. or its subsidiaries in the U.S. and other countries. Third-party names and marks referenced herein are trademarks or registered trademarks of their respective owners.

Notice of rights

Copyright © SunGard Higher Education <Years of Publication as First, Last>. This document is proprietary and confidential information of SunGard Higher Education Inc. and is not to be copied, reproduced, lent, displayed or distributed, nor used for any purpose other than that for which it is specifically provided without the express written permission of SunGard Higher Education Inc.

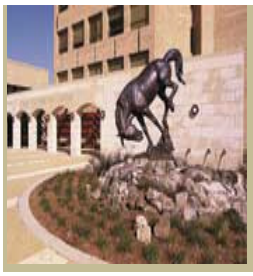


Table of Contents

Section A: Introduction **4**
Overview 4

Section B: Set Up **5**
Access and Responsibilities 5

Section C: Day-to-Day Operations **6**
Accessing Faculty Self-Service 6
*Your Personal Information 8
Updating Addresses & Phone #'s 9
Updating E-Mail Addresses 11
Updating Emergency Contacts 12
*Faculty and Advisor Tab 13
Viewing Faculty Detail Schedule 14
Adding or Maintaining a Class Syllabus 15
Week at a Glance 17
Viewing a Detailed Class List 18
Viewing the Summary Class List & Sending a Class E-Mail 19
Viewing and Updating Office Hours 21
Viewing and Searching the Course Catalog 23
Viewing and Searching the Class Schedule 24
*Viewing Student Menu 25
Accessing a Students Schedule 28
Viewing student holds 30
Viewing a Student Transcript 32
Clearing an Advisement Hold 33
Helpful Contacts 34

Section A: Introduction

Lesson: Overview

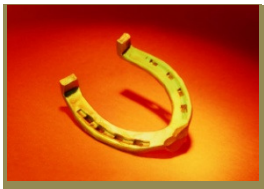
Jump to TOC

User guide goal

The goal of this user guide is to provide UT-Pan American Faculty and Staff step-by-step instructions on how to perform their duties on the Banner Student Information System.

Intended audience

UT-Pan American Faculty and Staff



Section B: Set Up

Lesson: Access and Responsibilities

Jump to TOC

Your Access
As a general principle of access, the UTPA data (regardless of who collects or maintains it) will be shared among those employees whose work can be done more effectively by knowledge of such information. Although UTPA must protect the security and confidentiality of data, the procedures allowing access to data must not improperly interfere with the efficient conduct on UTPA business.

Access to the Student Information System (SIS) is based on a user's job role and responsibilities. Web for Students and Web for Faculty and Advisors permit some update capabilities defined in a user's college, department, and instructional assignments.

Your Responsibility
By law, certain data is confidential and may not be released without proper authorization. Users must adhere to any applicable federal and state laws, UT System regulations, and UTPA policies and procedures concerning storage, retention, use release and destruction of data.

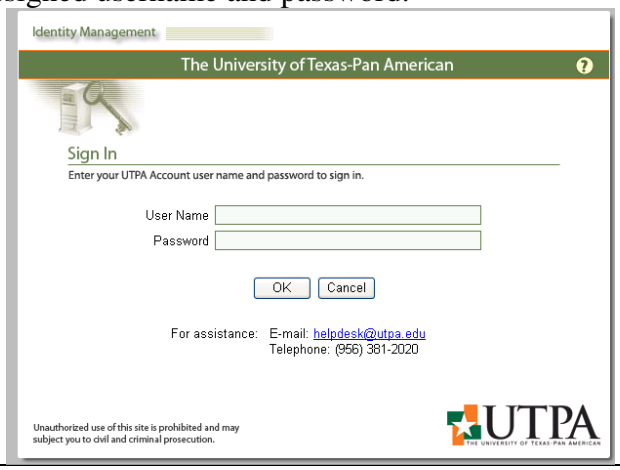
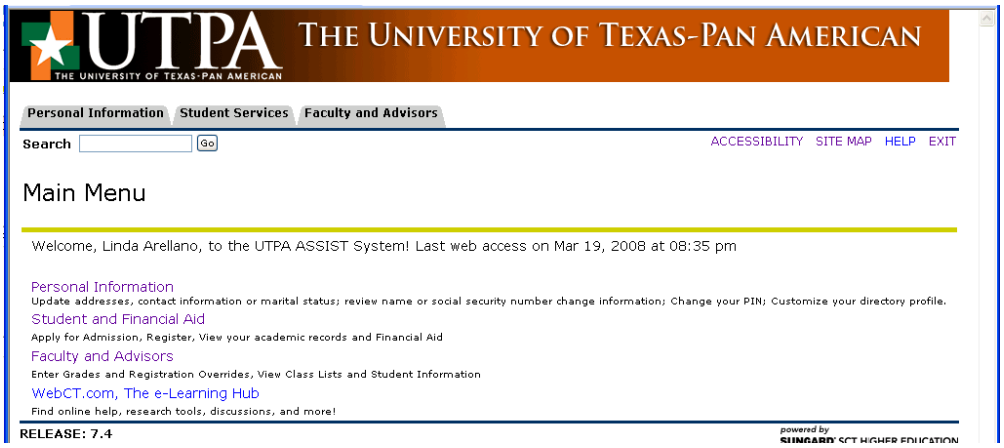
Generally, student records are protected by the Family Rights and Privacy Act of 1974 (FERPA). Access to these records is restricted to those with an "educational need to know" or those who have the express consent of the student. This protection does not expire when a student leaves the University. In addition, FERPA allows for certain information to be defined as *Directory Information*. This information may be publicly released, unless the student requests nondisclosure through the Office of the Registrar. *Directory Information* is outlined in the current UTPA graduate and undergraduate catalogs. Additionally, UT System Business process memorandum (BPM 66) protects the use of social security numbers

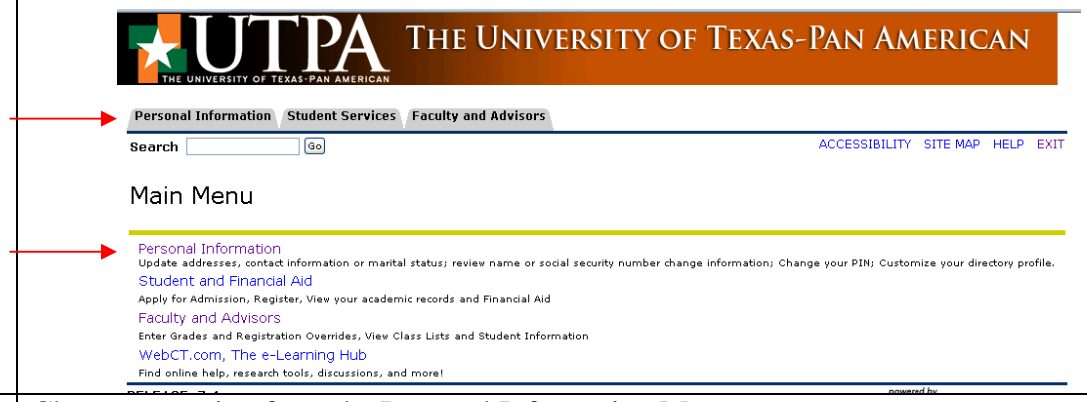
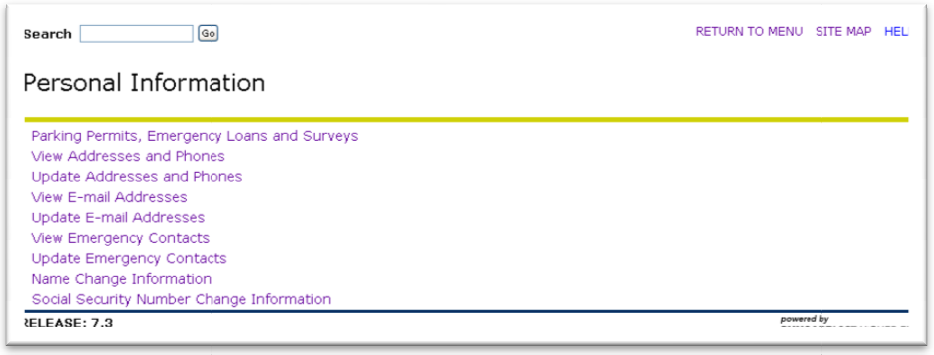
© SunGard 2004-2006

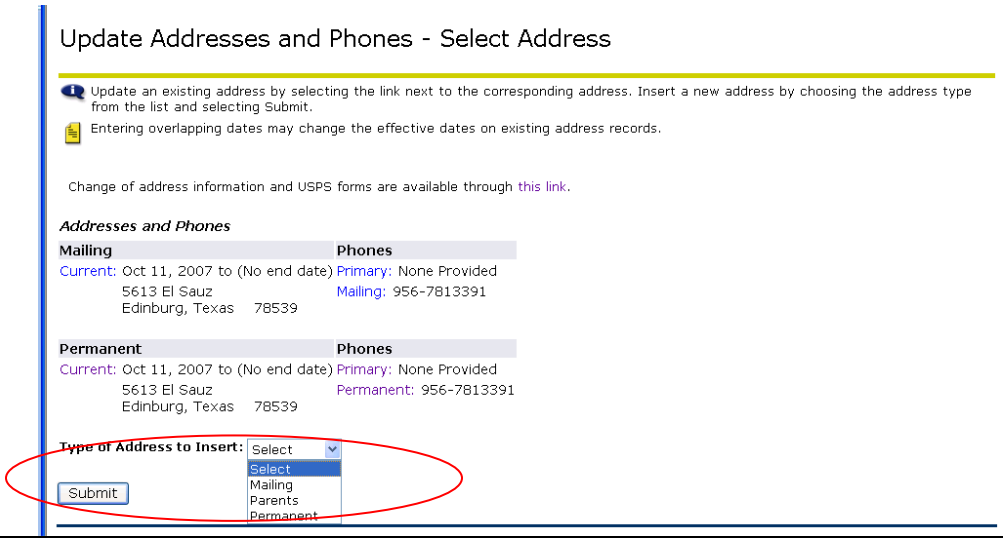
To access the Banner Faculty Self-Service as an authenticated user, you must successfully login using your **User ID** and **Password**.

Step	Action
1	Access ASSIST using the following link: **http://faculty.utpa.edu** This page will appear:
2	Click on the Fall 2008 button
3	Click on Enter Online Services for Students, Faculty, and Advisors

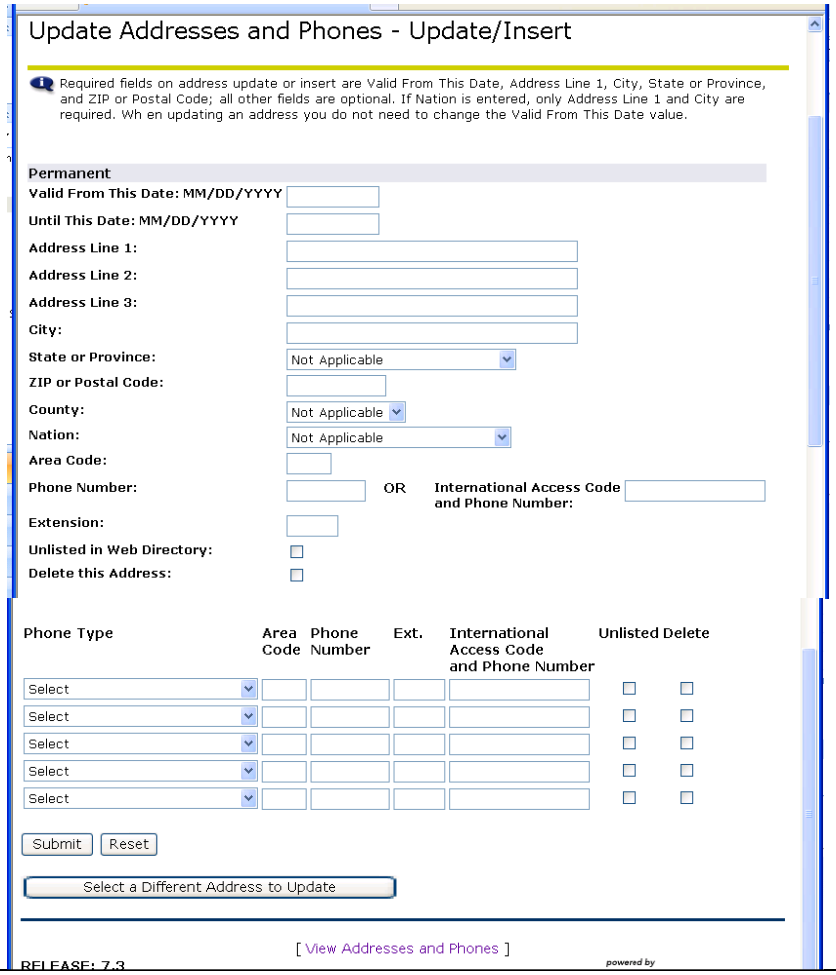
Procedure, continued

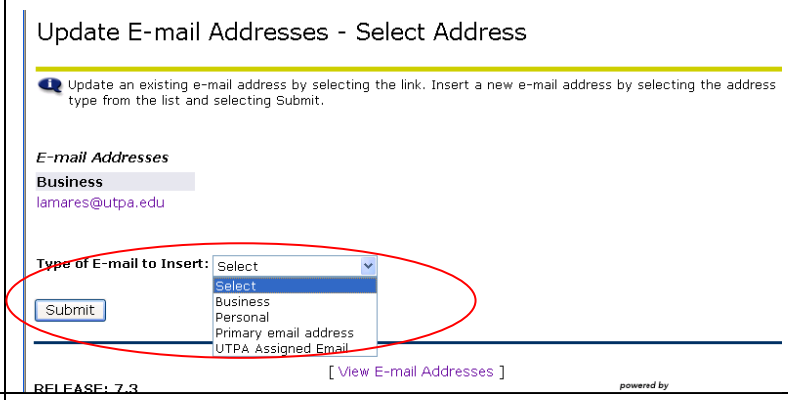
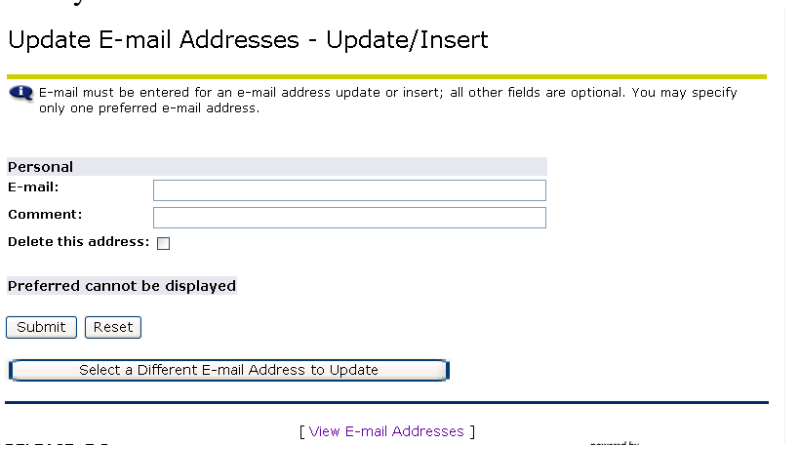
Step	Action
4	Enter your UTPA assigned username and password. 
5	You are IN! 

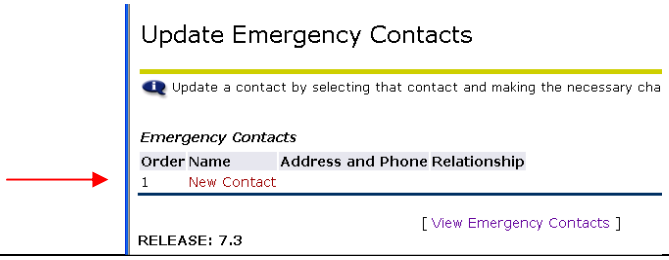
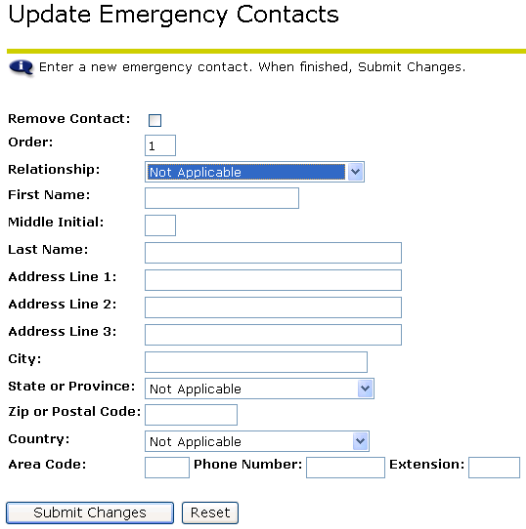
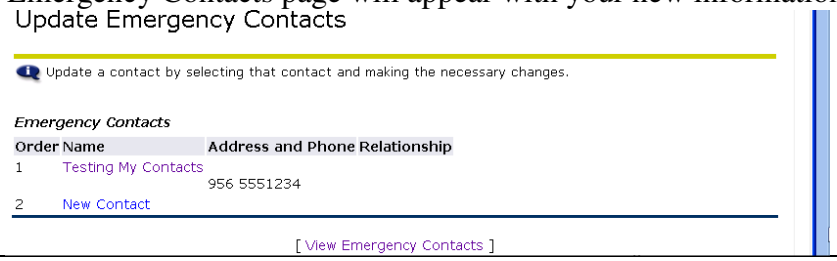
Step	Action
1	Log into Self-Service using instructions from Lesson: Accessing Faculty Self-Service
2	Click on the Personal Information tab or link. 
3	Choose an option from the Personal Information Menu 

Step	Action
1	Log into Self-Service
2	Click on the Personal Information Tab
3	Click on Update Addresses and Phones
4	Select which type of information you'd like to update using the Type of Address down arrow and click Submit 

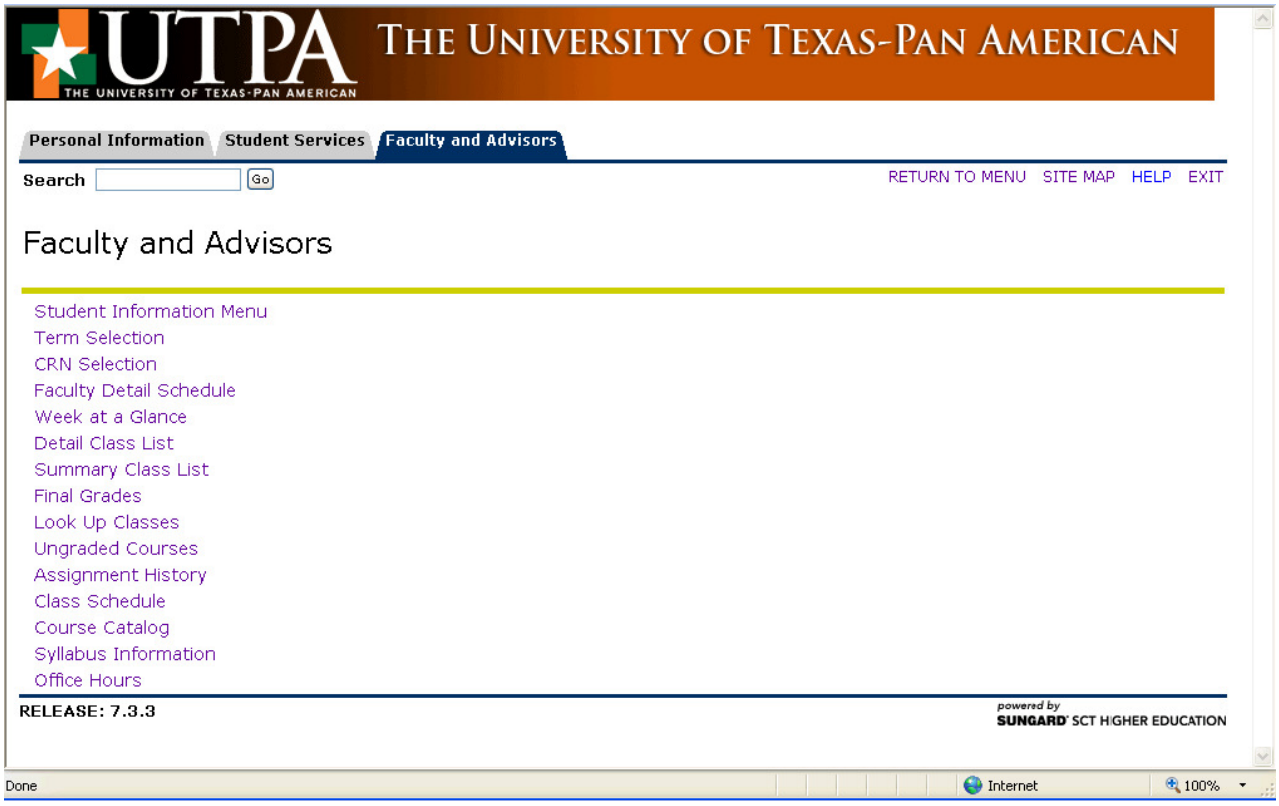
Update Addresses and Phones - Select Address
Update an existing address by selecting the link next to the corresponding address. Insert a new address by choosing the address type from the list and selecting Submit.
Entering overlapping dates may change the effective dates on existing address records.
Change of address information and USPS forms are available through this link.
Addresses and Phones
Mailing
Phones
Current: Oct 11, 2007 to (No end date)
5613 El Sauz
Edinburg, Texas 78539
Primary: None Provided
Mailing: 956-7813391
Permanent
Phones
Current: Oct 11, 2007 to (No end date)
5613 El Sauz
Edinburg, Texas 78539
Primary: None Provided
Permanent: 956-7813391
Type of Address to Insert:
Select
Select
Mailing
Parents
Permanent
Submit

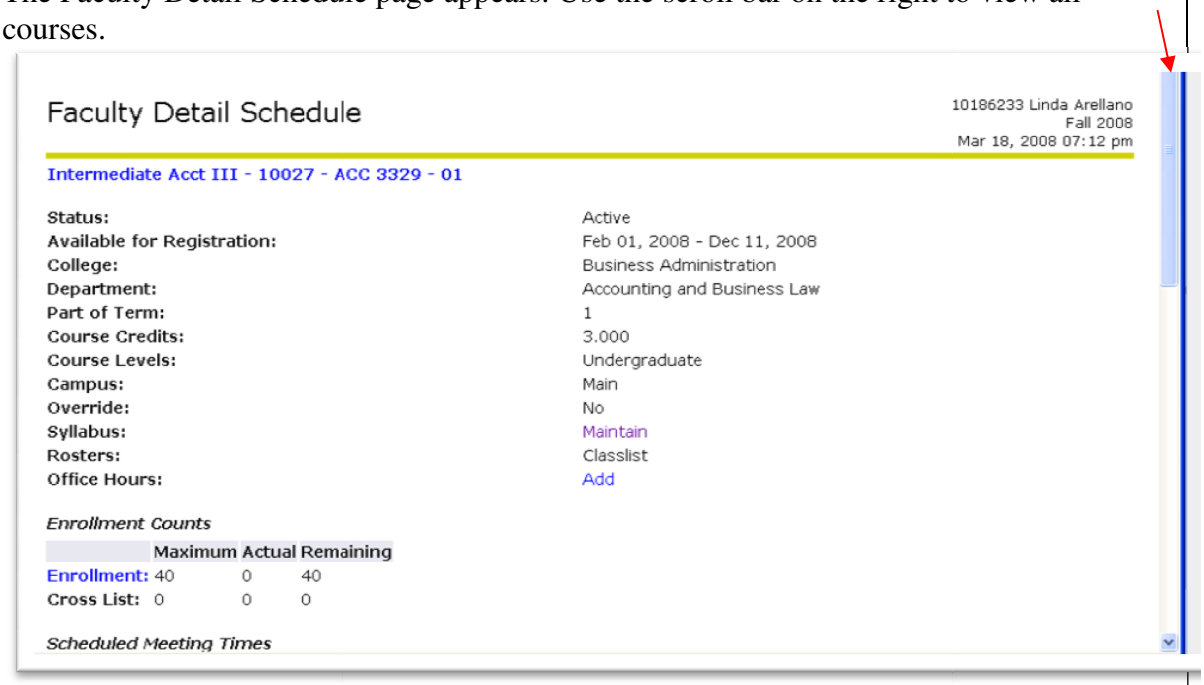
5	Enter the Dates you wish to start and all applicable information on the provided fields and click Submit. 
6	You will be able to view the updated information.

Step	Action
1	Log into Self-Service
2	Click on the Personal Information Tab
3	Click on Update E-mail Addresses
4	Select which email type you'd like to update using the Type of Email down arrow and click on the Submit button. 
5	Enter your new information and Click the Submit Button. 
6	The Update E-Mail Addresses page will appear with the new information.

Step	Action
1	Log into Self-Service
2	Click on the Personal Information Tab
3	Click on Update Emergency Contacts
4	Click on New Contact  Update Emergency Contacts Update a contact by selecting that contact and making the necessary cha Emergency Contacts Order Name Address and Phone Relationship 1 New Contact [View Emergency Contacts] RELEASE: 7.3
5	Enter information on the Update page then click on Submit Changes  Update Emergency Contacts Enter a new emergency contact. When finished, Submit Changes. Remove Contact: Order: 1 Relationship: Not Applicable First Name: Middle Initial: Last Name: Address Line 1: Address Line 2: Address Line 3: City: State or Province: Not Applicable Zip or Postal Code: Country: Not Applicable Area Code: Phone Number: Extension: Submit Changes Reset
6	The Update Emergency Contacts page will appear with your new information.  Update Emergency Contacts Update a contact by selecting that contact and making the necessary changes. Emergency Contacts Order Name Address and Phone Relationship 1 Testing My Contacts 956 5551234 2 New Contact [View Emergency Contacts]

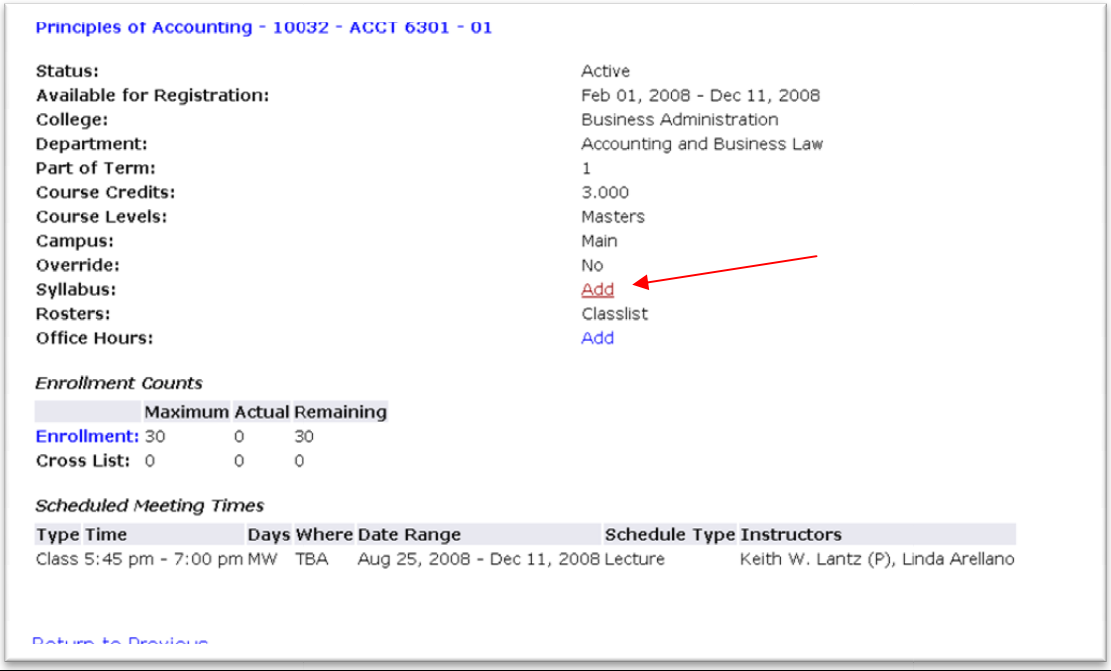
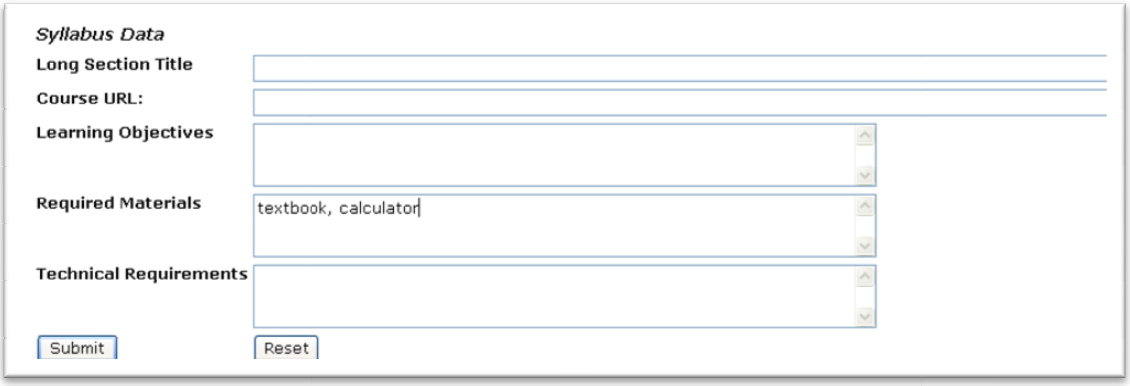
The following is a list of options under the **Faculty and Advisor Tab**.



Step	Action
1	Log into Self-Service
2	Click the Faculty and Advisor tab
3	Click on Faculty Detail Schedule The Select Term page appears
4	Select the desired term using the drop-down list
5	Click Submit The Faculty Detail Schedule page appears. Use the scroll bar on the right to view all courses. 
6	After viewing Faculty Detail Schedule page, click Return to Menu on upper right-hand corner of the screen to return to the Faculty and Advisors Menu

Section C: Day-to-Day Operations

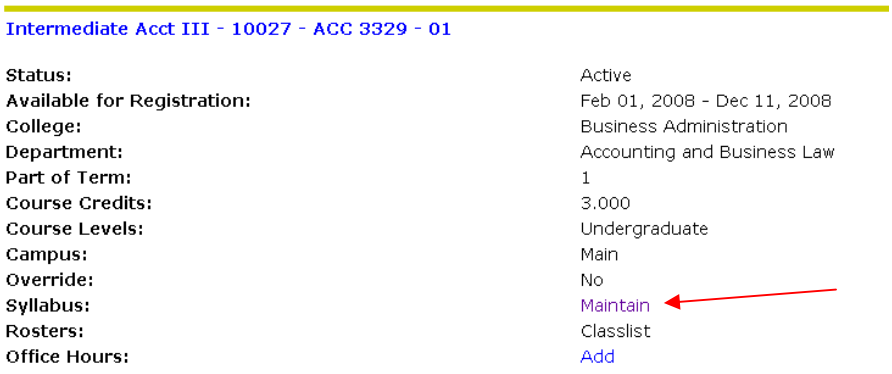
Lesson: Adding or Maintaining a Class Syllabus

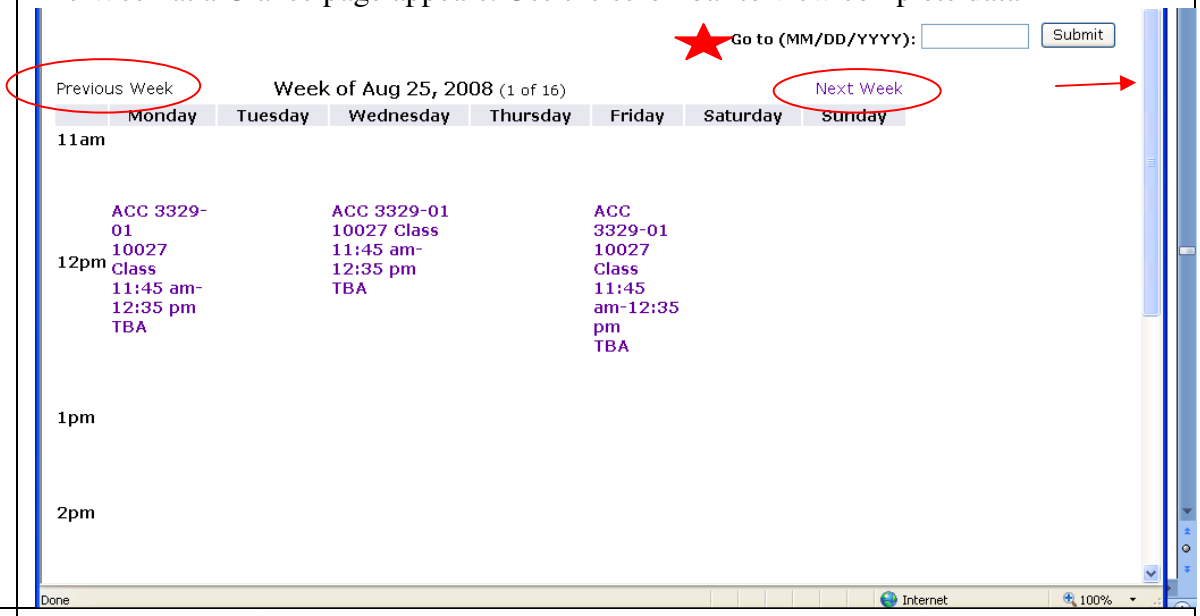
Step	Action
1	Log into Self-Service
2	Click the Faculty and Advisor tab
3	Click on Faculty Detail Schedule
4	Select the course you would like to update
5	Click Add on the Syllabus line to bring up Syllabus Information page. 
6	Enter desired Syllabus data and click on Submit 
7	Look for the following message: ☑ You have updated your syllabus information successfully.

Principles of Accounting - 10032 - ACCT 6301 - 01
Status: Active
Available for Registration: Feb 01, 2008 - Dec 11, 2008
College: Business Administration
Department: Accounting and Business Law
Part of Term: 1
Course Credits: 3.000
Course Levels: Masters
Campus: Main
Override: No
Syllabus: Add
Rosters: Classlist
Office Hours: Add
Enrollment Counts
Maximum Actual Remaining
Enrollment: 30 0 30
Cross List: 0 0 0
Scheduled Meeting Times
Type Time Days Where Date Range Schedule Type Instructors
Class 5:45 pm - 7:00 pm MW TBA Aug 25, 2008 - Dec 11, 2008 Lecture Keith W. Lantz (P), Linda Arellano

© SunGard 2004-2006

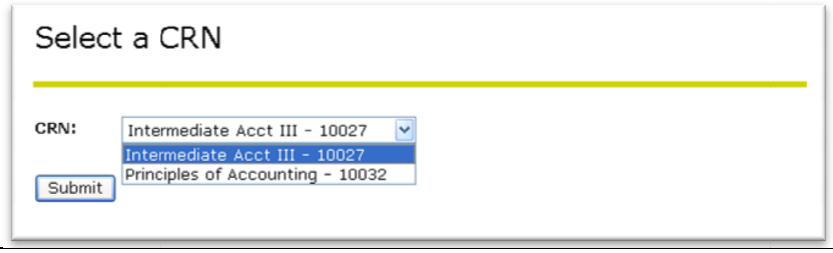
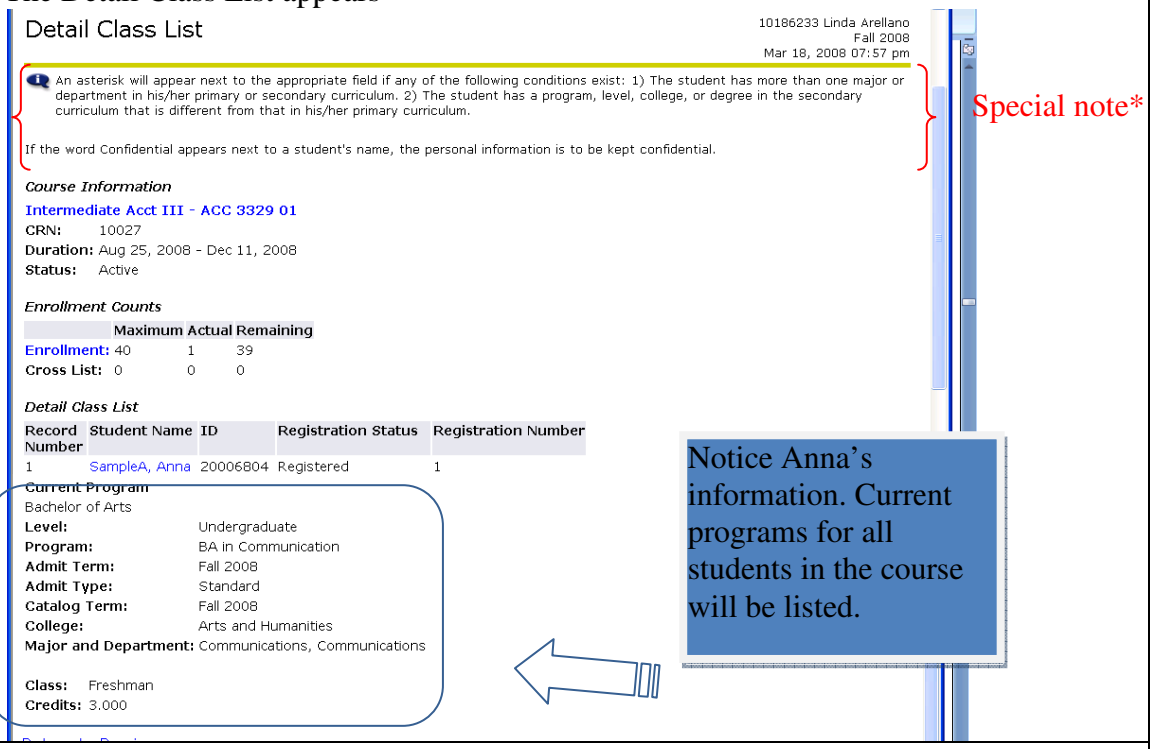
Procedure, continued

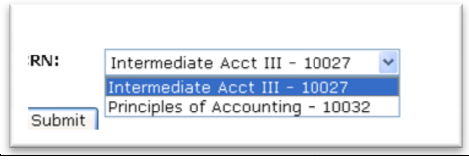
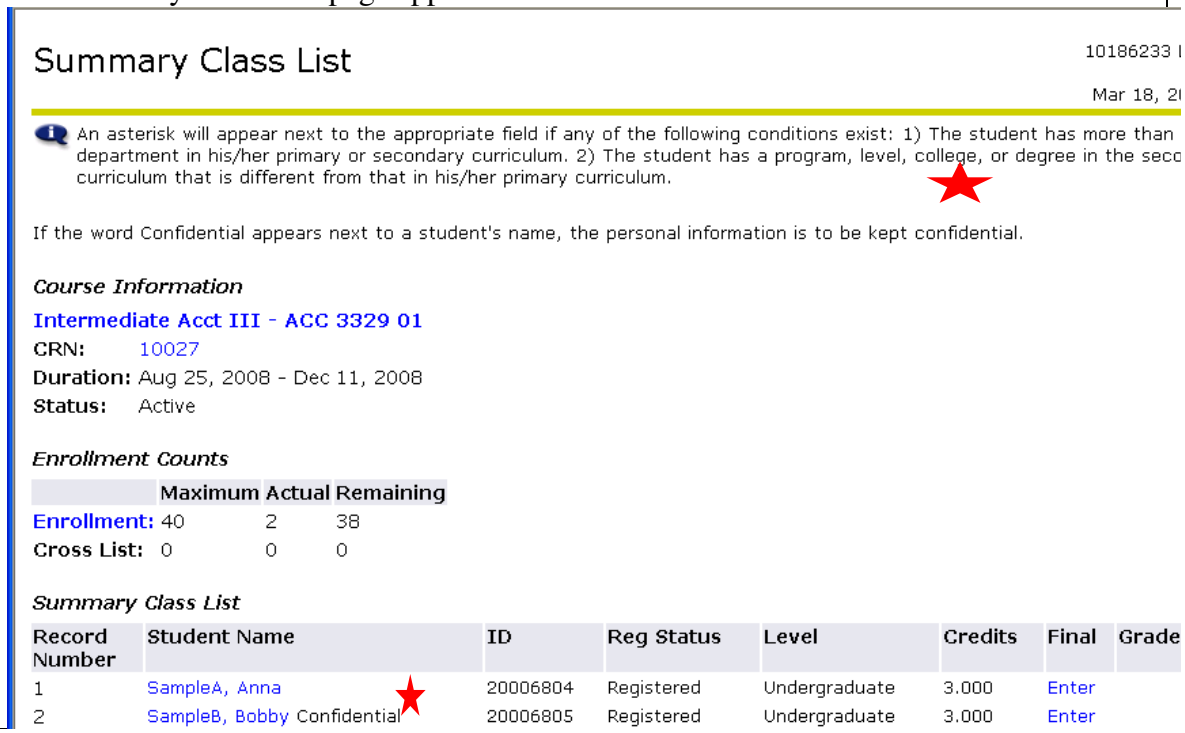
Step	Action
	OR
7	To update/maintain a syllabus, follow the steps 1-4
8	Click on Maintain to view Syllabus Information page 
6	Change the desired information and click Submit
7	Look for the following message: ☑ You have updated your syllabus information successfully.
8	After updating and/or maintaining the course syllabus, click Return to Menu on upper right-hand corner of the screen to return to the Faculty and Advisors Menu

Step	Action
1	Log into Self-Service
2	Click the Faculty and Advisor tab
3	Click on Week at a Glance The Week at a Glance page appears. Use the scroll bar to view complete data 
4	To view the **Previous Week** or **Next Week** of a semester, click **Previous Week** or **Next Week** (circled in red). The Week at a Glance page appears.
5	To view a Specific Week in a semester, complete the Go To (MM/DD/YYYY) field.★ The Week at a Glance page appears.
6	After viewing the Week at a Glance page, click Return to Menu in the upper-right hand corner of the screen to return to the Faculty and Advisors Menu

Section C: Day-to-Day Operations

Lesson: Viewing a Detailed Class List

Step	Action
1	Log into Self-Service
2	Click the Faculty and Advisor tab
3	Click on Detail Class List The Select CRN page appears
4	Select the CRN (course) from the drop-down list 
5	Click Submit The Detail Class List appears 
6	After viewing the Detail Class List page, click Return to Menu in the upper-right hand corner of the screen to return to the Faculty and Advisors Menu

Step	Action
1	Log into Self-Service
2	Click the Faculty and Advisor tab
3	Click on Summary Class List The Select a term page appears
4	Select a CRN using the drop-down list 
5	Select course and click Submit The Summary Class List page appears 

Summary Class List

10186233 I

Mar 18, 2(

An asterisk will appear next to the appropriate field if any of the following conditions exist: 1) The student has more than department in his/her primary or secondary curriculum. 2) The student has a program, level, college, or degree in the secc curriculum that is different from that in his/her primary curriculum.

If the word Confidential appears next to a student's name, the personal information is to be kept confidential.

Course Information

Intermediate Acct III - ACC 3329 01

CRN: 10027

Duration: Aug 25, 2008 - Dec 11, 2008

Status: Active

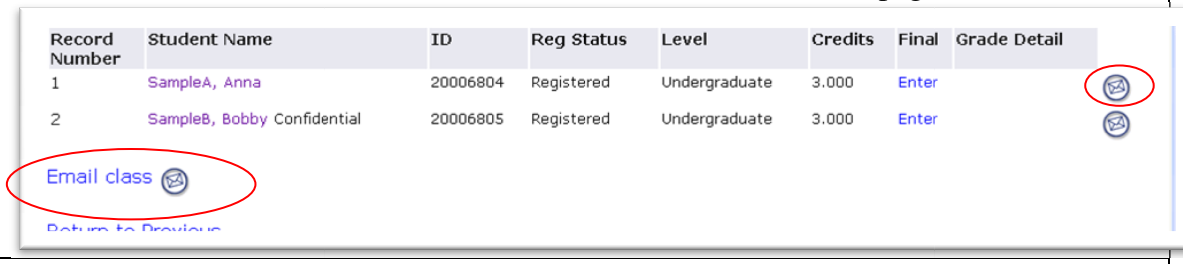
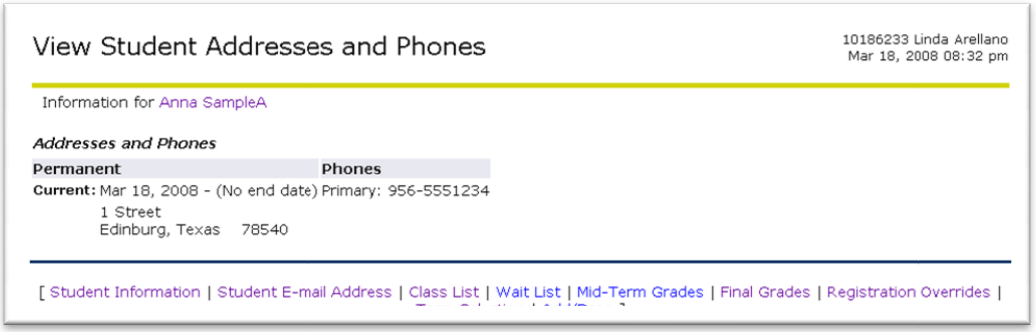
Enrollment Counts

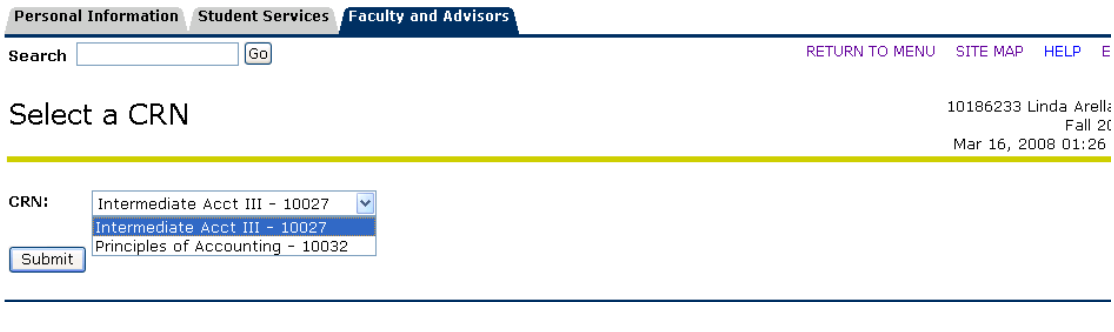
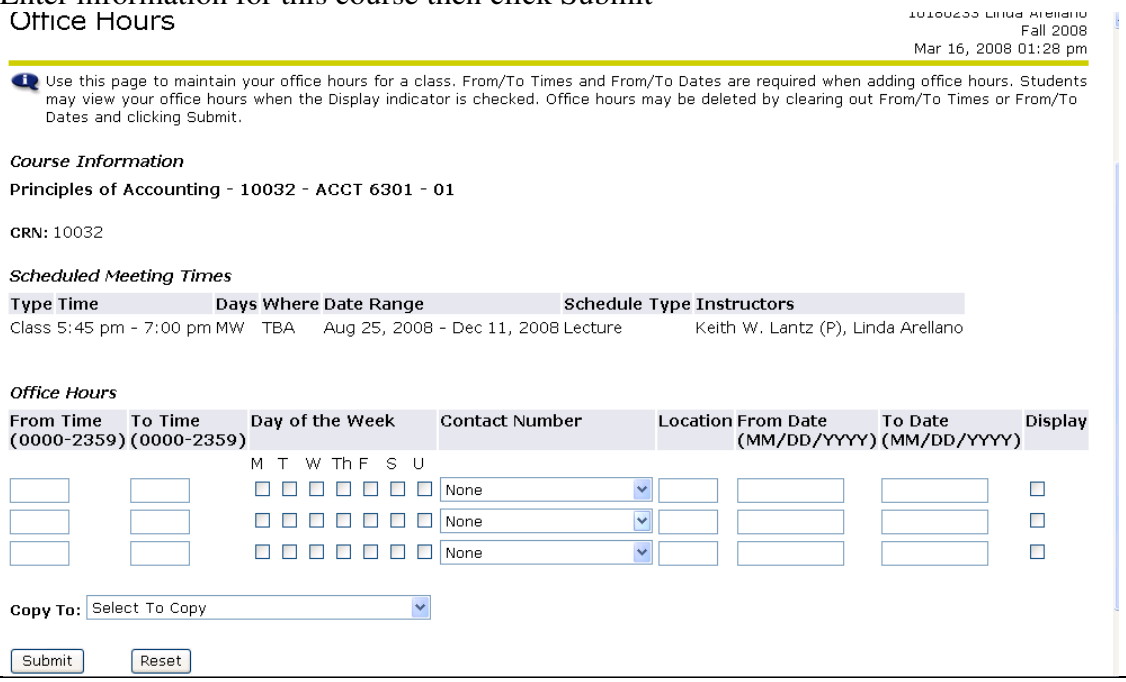
	Maximum	Actual	Remaining
Enrollment:	40	2	38
Cross List:	0	0	0

Summary Class List

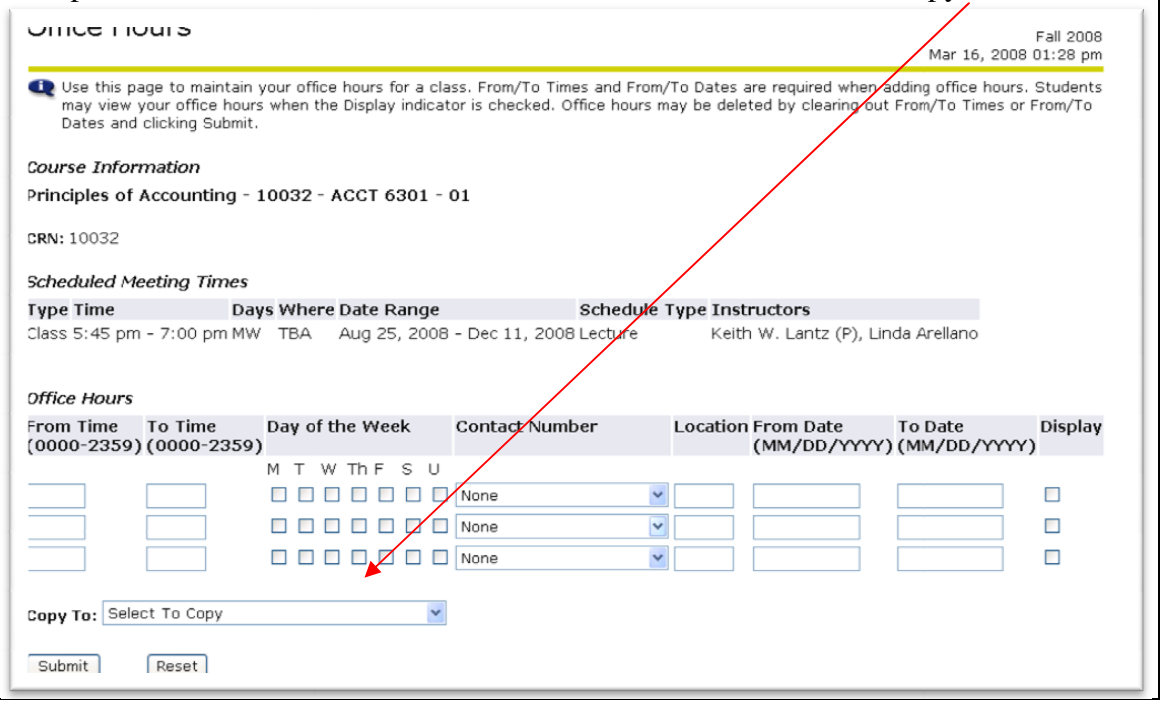
Record Number	Student Name	ID	Reg Status	Level	Credits	Final	Grade
1	SampleA, Anna	20006804	Registered	Undergraduate	3.000	Enter	
2	SampleB, Bobby Confidential	20006805	Registered	Undergraduate	3.000	Enter	

Procedure, continued

Step	Action
6	To E-mail a student, click the e-mail icon next to their name To E-mail the entire class, click the e-mail icon at the bottom of the page 
7	To view student information, click on the student name. Their address and phone information will appear 
8	After viewing the Class Summary page, click Return to Menu in the upper-right hand corner of the screen to return to the Faculty and Advisors Menu

Step	Action
1	Log into Self-Service
2	Click on Faculty and Advisors tab
3	Click on Office Hours
4	Select a Term and click Submit
5	Choose a Course from the CRN drop down list and Click Submit.  Personal Information Student Services Faculty and Advisors Search Go RETURN TO MENU SITE MAP HELP E Select a CRN 10186233 Linda Arell Fall 2 Mar 16, 2008 01:26 CRN: Intermediate Acct III - 10027 Intermediate Acct III - 10027 Principles of Accounting - 10032 Submit
6	Enter information for this course then click Submit  Office Hours Fall 2008 Mar 16, 2008 01:28 pm Use this page to maintain your office hours for a class. From/To Times and From/To Dates are required when adding office hours. Students may view your office hours when the Display indicator is checked. Office hours may be deleted by clearing out From/To Times or From/To Dates and clicking Submit. Course Information Principles of Accounting - 10032 - ACCT 6301 - 01 CRN: 10032 Scheduled Meeting Times Type Time Days Where Date Range Schedule Type Instructors Class 5:45 pm - 7:00 pm MW TBA Aug 25, 2008 - Dec 11, 2008 Lecture Keith W. Lantz (P), Linda Arellano Office Hours From Time (0000-2359) To Time (0000-2359) Day of the Week Contact Number Location From Date (MM/DD/YYYY) To Date (MM/DD/YYYY) Display M T W Th F S U None None None Copy To: Select To Copy Submit Reset

6	To duplicate same office hours for another course, select course from Copy to field.


Fall 2008
Mar 16, 2008 01:28 pm
Use this page to maintain your office hours for a class. From/To Times and From/To Dates are required when adding office hours. Students may view your office hours when the Display indicator is checked. Office hours may be deleted by clearing out From/To Times or From/To Dates and clicking Submit.
Course Information
Principles of Accounting - 10032 - ACCT 6301 - 01
CRN: 10032
Scheduled Meeting Times
Type Time Days Where Date Range Schedule Type Instructors
Class 5:45 pm - 7:00 pm MW TBA Aug 25, 2008 - Dec 11, 2008 Lecture Keith W. Lantz (P), Linda Arellano
Office Hours
From Time (0000-2359) To Time (0000-2359) Day of the Week Contact Number Location From Date (MM/DD/YYYY) To Date (MM/DD/YYYY) Display
M T W Th F S U
None
None
None
Copy To: Select To Copy
Submit
Reset

The course catalog is a general source guide which only provides course descriptions.

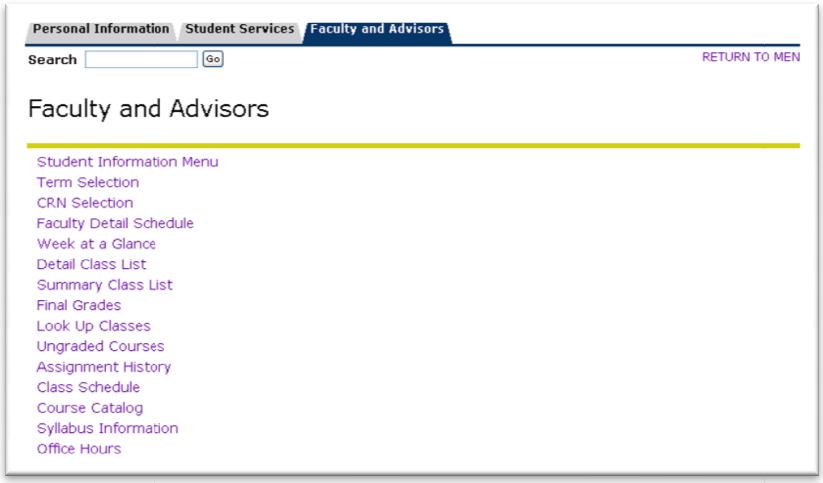
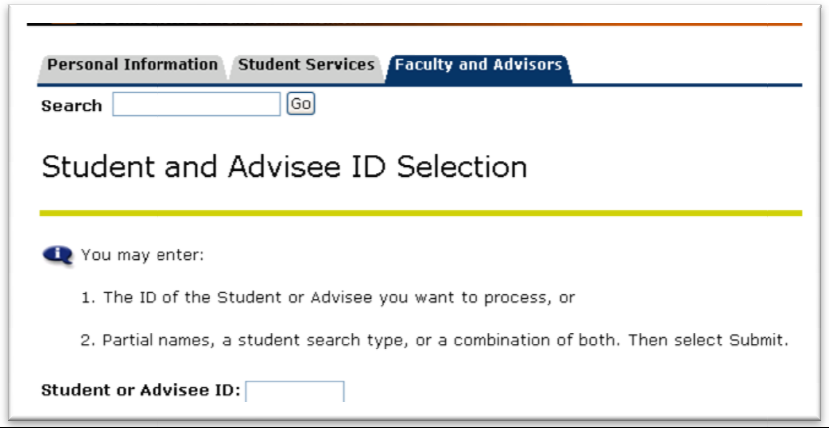
Step	Action
1	Log into Self-Service
2	Click on the Faculty and Advisors tab
3	Click on Course Catalog to view Catalog Term page
4	Select desired term in Search by Term drop down list
5	Click Submit The Course Catalog page appears
6	In the Subject, Title, Level, Schedule Type, College, and Department fields, select or enter the desired search information **YOU DO NOT HAVE TO ENTER EVERY FIELD**
7	Click Get Courses The Catalog Entries page appears
8	On the Catalog Entries page, click the Course Entry to view course details.
9	After viewing course details, click on Site Map in the upper-right side of screen to return to the Faculty and Advisors Menu

The Course Schedule is different than the Course Catalog in that the Schedule, as a semester course offering guide, provides information for courses offered.

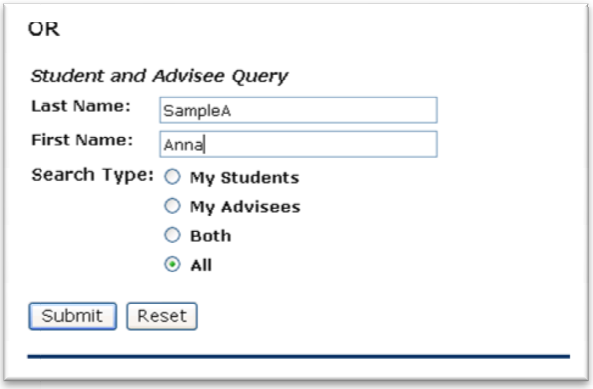
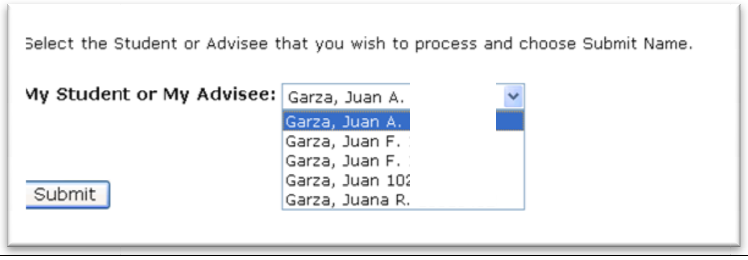
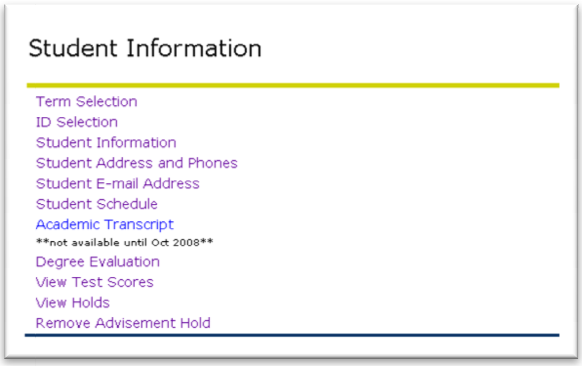
Step	Action
1	Log into Self-Service
2	Click on the Faculty and Advisors tab
3	Click on Class Schedule to view Class Schedule Search page
4	Select desired term in Search by Term drop down list
5	Click Submit The Class Schedule Search page appears
6	In the Subject, Course Number, Title, Campus, Course Level or Instructor fields, select or enter the desired search information. **YOU DO NOT HAVE TO ENTER EVERY FIELD**
7	Click Class Search The Class Search Listing page appears
8	On Class Schedule page, click the Section Found to view class details.
9	After viewing class details, click Site Map in the upper right-hand corner of the screen to return to the Faculty and Advisors Menu

Section C: Day-to-Day Operations

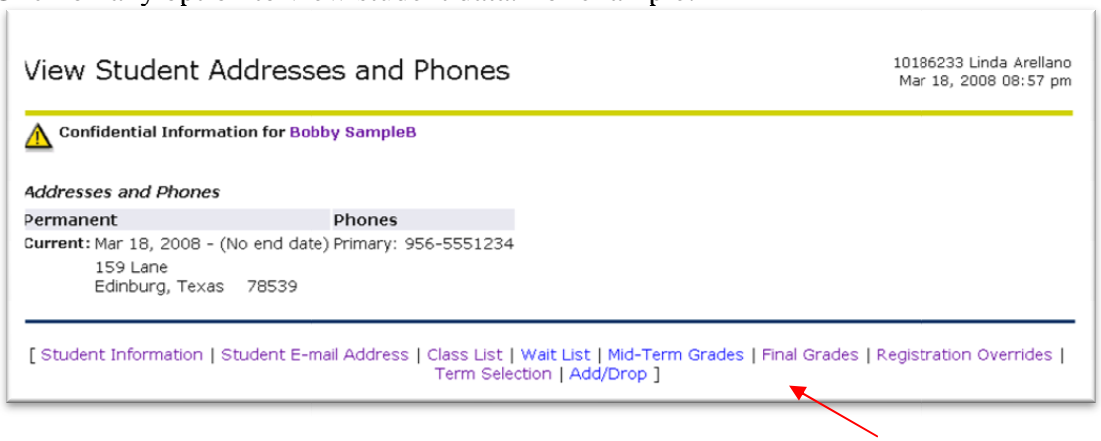
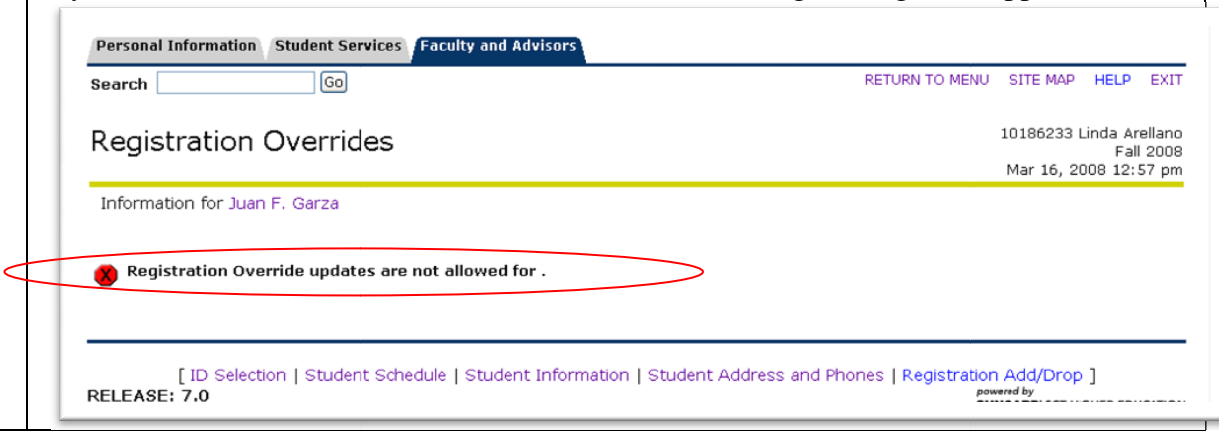
Lesson: *Viewing Student Menu

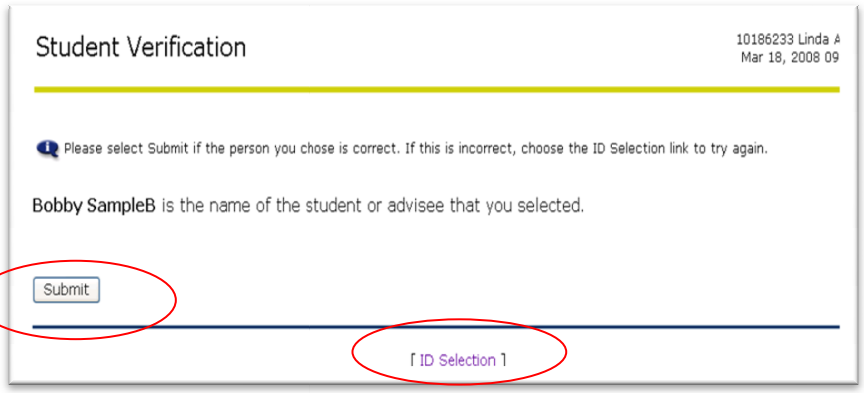
Step	Action
1	Log into Self-Service
2	Click on Faculty and Advisor Tab
3	Click on Student Information to view the following options. 
4	Click on ID Selection
5	You can either enter the student ID in the Student or Advisee ID field and click Submit 

Procedure, continued

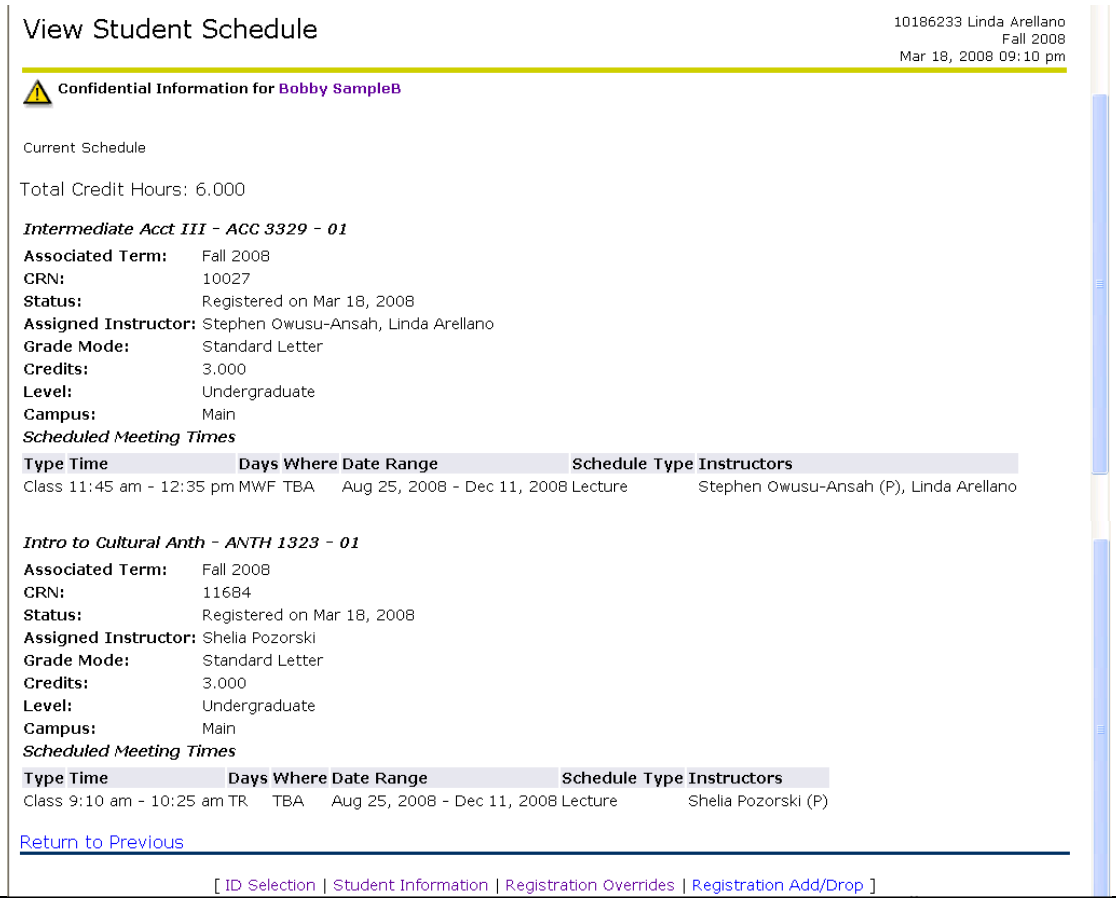
Step	Action
5A	Or, you can use the Student and Advisee Query. To use these fields, enter student last and first name in field and click on Submit.  If there is more than one student with the same name, you will be able to view those options to search for correct candidate. Click on Submit to view student information. 
6	The **Student Information** page will appear. 

Procedure, continued

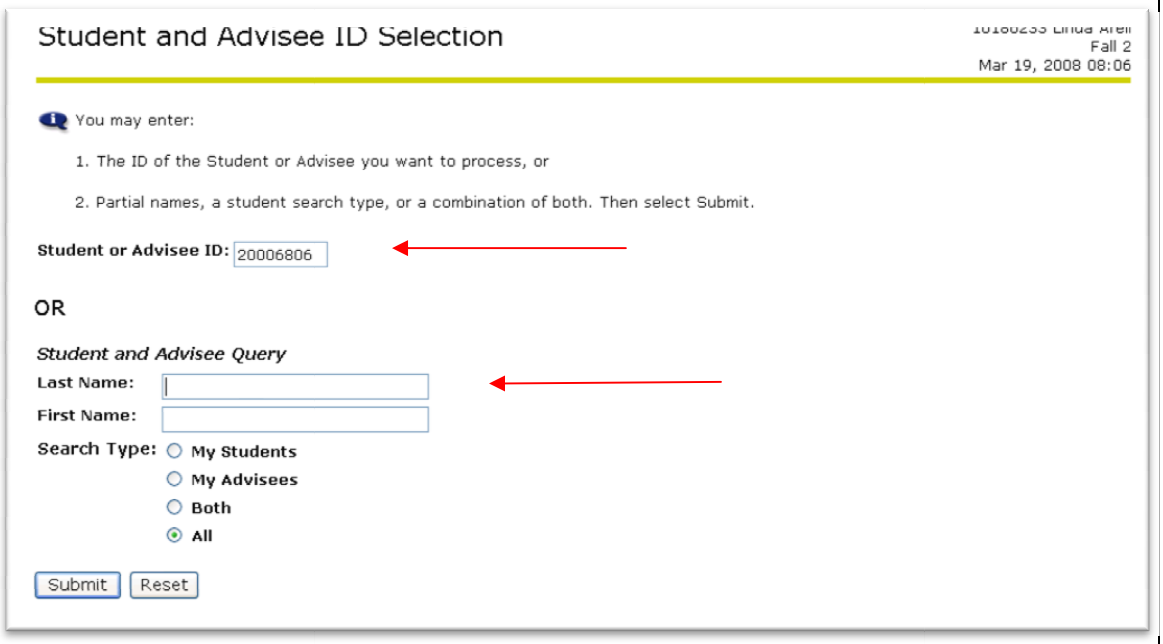
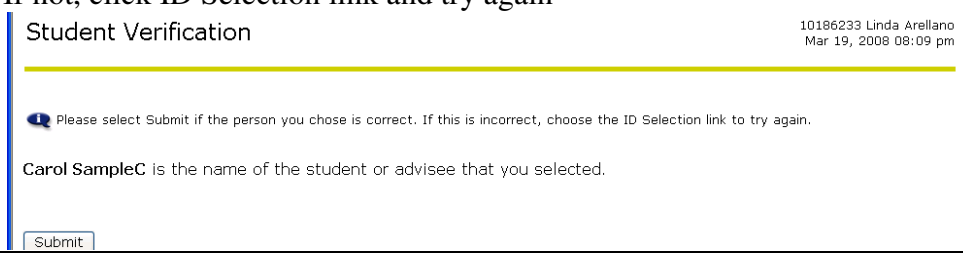
Step	Action
7	Click on any option to view student data. For example:  You can use the menu options at the bottom of the page to navigate.
8	If you do not have access to certain functions, the following message will appear: 

Step	Action
1	Log into Self-Service
2	Click on Faculty and Advisor Tab
3	Click on Student Information Menu
4	Click on ID Selection The Select Term page will appear
5	Select desired term and click Submit
6	Enter student information (ID or name) and click Submit (use previous lessons instructions) The Student Verification page appears
7	If this is the correct student, click Submit If not, click ID Selection  The Student Information page will appear

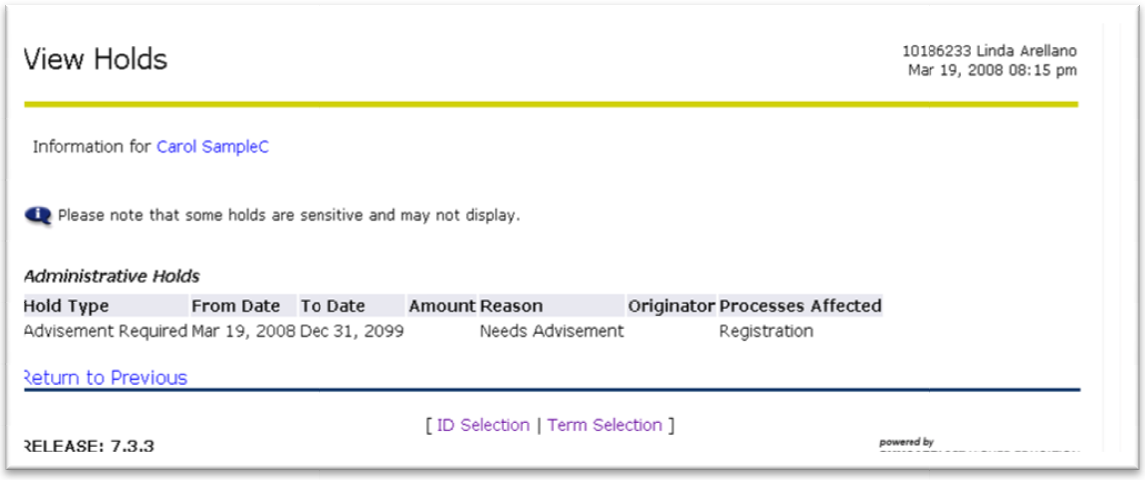
Procedure, continued

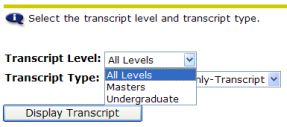
Step	Action
8	Click on Student Schedule The View Student Schedule page will appear 
9	To view another student, click ID Selection at the bottom of the page. Or click on Return to Menu to return to the Faculty and Advisors tab

View Student Schedule
10186233 Linda Arellano
Fall 2008
Mar 18, 2008 09:10 pm
Confidential Information for Bobby SampleB
Current Schedule
Total Credit Hours: 6.000
Intermediate Acct III - ACC 3329 - 01
Associated Term: Fall 2008
CRN: 10027
Status: Registered on Mar 18, 2008
Assigned Instructor: Stephen Owusu-Ansah, Linda Arellano
Grade Mode: Standard Letter
Credits: 3.000
Level: Undergraduate
Campus: Main
Scheduled Meeting Times
Type Time Days Where Date Range Schedule Type Instructors
Class 11:45 am - 12:35 pm MWF TBA Aug 25, 2008 - Dec 11, 2008 Lecture Stephen Owusu-Ansah (P), Linda Arellano
Intro to Cultural Anth - ANTH 1323 - 01
Associated Term: Fall 2008
CRN: 11684
Status: Registered on Mar 18, 2008
Assigned Instructor: Shelia Pozorski
Grade Mode: Standard Letter
Credits: 3.000
Level: Undergraduate
Campus: Main
Scheduled Meeting Times
Type Time Days Where Date Range Schedule Type Instructors
Class 9:10 am - 10:25 am TR TBA Aug 25, 2008 - Dec 11, 2008 Lecture Shelia Pozorski (P)
Return to Previous
[ID Selection | Student Information | Registration Overrides | Registration Add/Drop]

Step	Action
1	Log into Self-Service
2	Click on Faculty and Advisor Tab
3	Click on Student Information Menu
4	Click on View Holds The Select Term page will appear
5	Select a term and click Submit The Student and Advisee ID Section will appear
6	Enter either student ID or Name and click Submit  The Student Verification page will appear
7	If you are viewing the correct student name, click Submit If not, click ID Selection link and try again 

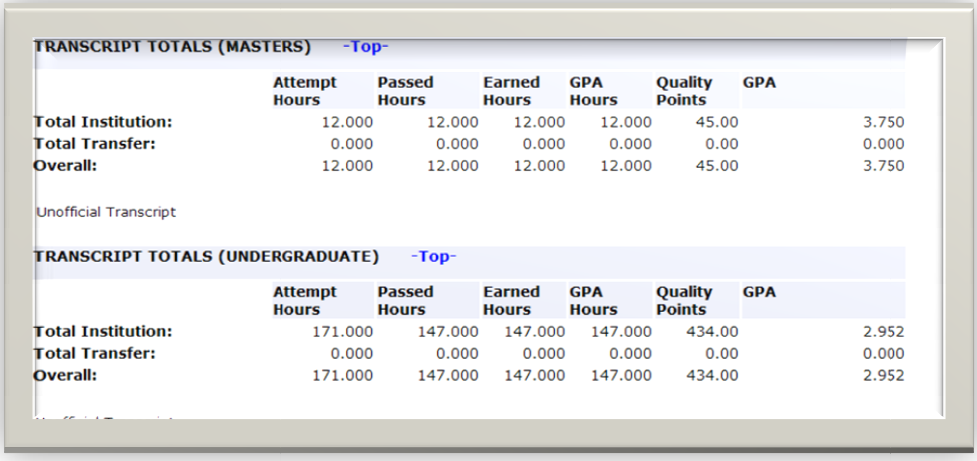
Procedure, continued

Step	Action
8	Sample of View Holds page: 
9	To view another student, click ID Selection at the bottom of the page. Or click on Return to Menu on upper right side of the screen to return to the Faculty and Advisors tab

Step	Action
1	Log into Self-Service
2	Click on Faculty and Advisor Tab
3	Click on Student Information Menu
4	Click on ID Selection to enter student ID or perform a name search The Student Verification page will appear with the Student name
5	Click Submit (or ID selection if you need to select another ID)
6	From the Student Information menu, Click Academic Transcript
7	Choose the Level and Transcript Type  Click Display Transcript
8	Scroll down to view all data.

GPA data is listed after semester and at the bottom.

If you chose to view all levels; the GPA's for different levels will be split at the end of the transcript.



TRANSCRIPT TOTALS (MASTERS) -Top-

	Attempt Hours	Passed Hours	Earned Hours	GPA Hours	Quality Points	GPA
Total Institution:	12.000	12.000	12.000	12.000	45.00	3.750
Total Transfer:	0.000	0.000	0.000	0.000	0.00	0.000
Overall:	12.000	12.000	12.000	12.000	45.00	3.750

Unofficial Transcript

TRANSCRIPT TOTALS (UNDERGRADUATE) -Top-

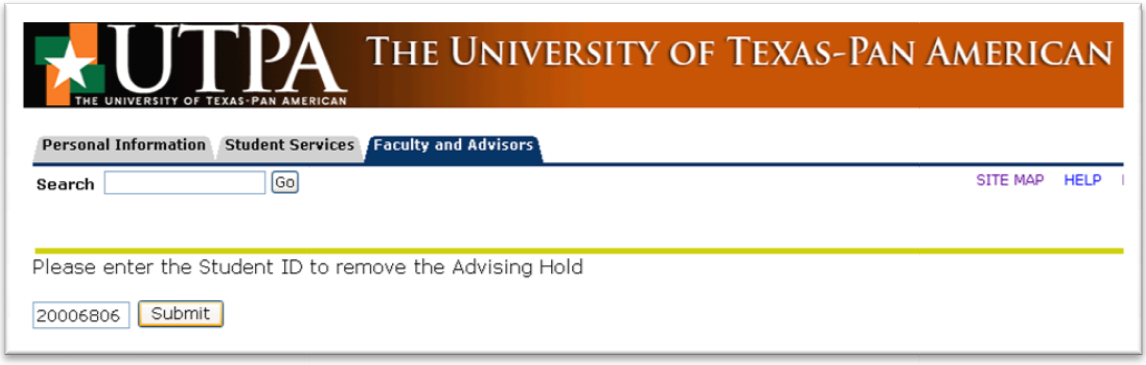
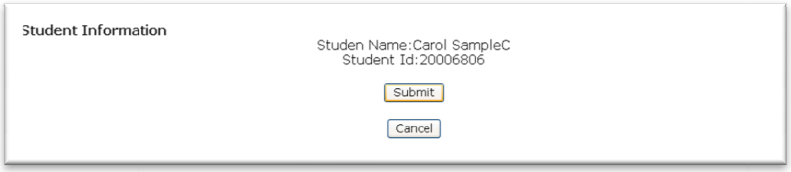
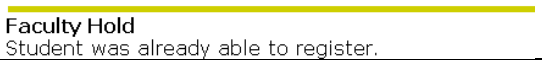
	Attempt Hours	Passed Hours	Earned Hours	GPA Hours	Quality Points	GPA
Total Institution:	171.000	147.000	147.000	147.000	434.00	2.952
Total Transfer:	0.000	0.000	0.000	0.000	0.00	0.000
Overall:	171.000	147.000	147.000	147.000	434.00	2.952

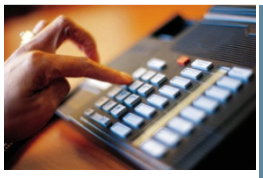
***Please Note: This is not an official transcript.**
Courses which are in progress may also be included on this transcript.

Section C: Day-to-Day Operations

Lesson: Clearing an Advisement Hold

You must be assigned as an Advisor by your department before you can remove a student advisement hold.
The Office of the Registrar will update your Banner profile if approved by the College Dean.

Step	Action
1	Log into Self-Service
2	Click on Faculty and Advisor Tab
3	Click on Student Information Menu
4	Click on Remove Advisement Hold
5	Enter student ID and click Submit  The Student Information page will appear
6	Click Submit to clear the Advising Hold  The following message will appear 
7	If you have entered the wrong ID, click Cancel and return to step 5
8	Click on the Faculty and Advisor tab to return to menu



Section D: Contact Information

Lesson: Helpful Contacts

Jump to TOC

Office of the Registrar	381-2201
Melinda Espinoza System Analyst III melinda@utpa.edu	316-7158
Linda A. Mares Business Analyst lamares@utpa.edu	381-2388
Debora McMillin Administrative Coordinator deleondy@utpa.edu	318-5356
Roy Munoz Computer User Service Specialist munoz@utpa.edu	316-7933
Joni Thomas Asst. Registrar tomasj@utpa.edu	318-5355
For technical assistance, please contact UTPA Helpdesk helpdesk@utpa.edu	381-2020

© SunGard 2004-2006

Release Date

Jump to TOC

v 2.0
This guide was last updated on April 24, 2008